

**METHODS AND SYSTEMS FOR MANAGING CALL REPORTS
FOR THE FINANCIAL SERVICES INDUSTRY**

Abstract of the Disclosure

5 The present invention provides methods and systems for managing call reports.
A call report message and information identifying a client matter are received via a
wireless network, a distribution list is determined by applying a set of visibility rules,
and the call report is created. Access to the call report is based on the distribution list.
The visibility rules are rules that encapsulate the various legal and ethical requirements
10 for allowing access to a client matter. The visibility rules may be created using a suitable
script language, and be adjusted from time to time.